

Migrating to Microsoft Office Project Server 2007

by Gord Schmidt

Although migrating from Microsoft Project Server 2003 to Microsoft Office Project Server 2007 is well documented on Microsoft TechNet, there are a few items that deserve further mention.

At a high-level, the complexity of the migration increases based on the quantity of SharePoint content; and/or if a partial migration is being contemplated.

A migration always should be well planned and one of the first steps of the planning process should be doing an inventory of the current system. An inventory allows you to verify the success of the migration plus it can identify elements that need to be handled pre- or post-migration. At a minimum, an inventory should include:

1. A **list of projects** with project names, the custom project fields, the start and finish dates, the URL for the SharePoint workspace and whether the project is externally modified. (Note that for a project to be marked as externally modified the last modification must have been made by something other than MS Project. If you modify a project's custom field's value using PWA that would qualify as externally modified.)
2. A **list of resources** with resource names, Windows accounts, custom resource fields and whether the resource is externally modified.
3. A **list of PWA views** noting the grouping and filtering defined.
4. The **security objects**: groups, categories and users.
5. A detailing of the **custom development** including reports, connections with other systems, macros within MS Project, Guides, and so on.

Revisit Security

Installing Project Server 2007 creates the standard security groups and categories but when the migration utility runs, it migrates the security settings from the 2003 database. This results in two set of security objects. You will need to merge the two sets taking into consideration your requirements and the permissions new to Project Server 2007.

Update Views

There are a number of data elements that are not moved as part of the migration (see the Microsoft migration guide for more details), but one item that is partially moved is the views. The grouping and filtering for views must be recreated manually after the migration.

Don't Forget!

Client-Side Software

Don't forget to co-ordinate the deployment of the client-side software (MS Project 2007, the PWA ActiveX controls and the necessary software to access OLAP views) with your migration.

SharePoint Workspace

If you are using a customized SharePoint Workspace template in Project Server 2003, it will not be migrated. Instead you need to customize the default 2007 template and deploy it in your new environment.

Training

One key to a successful migration is training, particularly for Project Managers so they can take advantage of the new features in Project Server 2007.



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Gord Schmidt is Technical Lead for Enterprise Project Management Solutions. He can be reached at gschmidt@agorainc.com or 416-994-4673